

TISA Steering Committee Meeting

July 31, 2023, 4:00 PM CST, Microsoft Teams

Meeting Notes

Attendees

Bo Griffin, Director of Schools, Millington Municipal Schools
Steve Barnett, Director of Schools, Johnson City Schools
Justin Robertson, Director of Schools, Hamilton County Schools
Christy Carroll Highfill, Parent
Jen Aprea, Parent, The Arc Tennessee
Guy Respass, Data Management Director, Knox County Schools
Teresa Winter, CFO, Bartlett City Schools
Victor Evans, Executive Director, Tennessee CAN
Jack Powers, Regional Legislative Director, ExcelinEd
Gini Pupo Walker, Executive Director, EdTrust
Dewayne Tucker, CEO, Lead Public Schools

TDOE Staff Attendees

Lizzette Reynolds, Commissioner of Education
Chelsea Crawford, Chief of Staff
Sam Percy, Deputy Commissioner of Operations
Kristy Brown, Chief Academic Officer
Shannon Gordon, Chief Operating Officer
Maryanne Durski, Chief Financial Officer
Aimee LaGrone, Senior Director of Engagement
Reed Cook, Director of Legislative Affairs
Grace Shelton, Asst. Commissioner of Program & Financial Performance & Evaluation
Nia Perry, Engagement Specialist

Greetings and Opening Comments

Chelsea Crawford welcomed all committee members and staff to the meeting. After the welcome, Chelsea gave an overview of the meeting discussion items:

- TISA Implementation Status Update
- TISA Resources
- Implementation Next Steps
- Transparency & Accountability
- State Report Card Focus Groups

Priority 1: TISA Implementation Update

Deputy Commissioner Sam Percy welcomed the committee members and began giving updates on TISA Implementation.

2023-24 TISA Allocations Process

- The department began releasing data files beginning with January 2023's data.
- Once the Governor's budget was released, preliminary funding allocation letters were sent beginning in February 2023 (2 months earlier than the BEP.)
- Final allocations were released to districts on July 7, 2023
 - Allocation information included:
 - TISA Calculator – Included application of TISA rules to district data, a local contribution calculator, and required funds for existing educator salary increases.
 - 9 Period Summary tab with averages by funding line and reporting period.
 - School Calculations tab including funding amounts by school.
 - School Counts tab with averaged reporting periods by funding line
 - District-submitted and state level input data:
 - Base Averaged Daily Membership (ADM) (also used for Small, Sparse, Concentrated Poverty, Post-Secondary Test, K-3 Literacy, and Charter)
 - Economically Disadvantaged ADM by student and school
 - Concentrated poverty school list from district Consolidated Funding Application in ePlan.
 - Sparse calculation inputs of square miles by county
 - Special Education ADM by student and school
 - English Learner ADM by student and school with English Learner Tier
 - Career and Technical Education ADM (CTE ADM) by student by course and school
 - 3rd Grade ELA TCAP results by student by school.
- Public charter school authorizers and schools/operators also received school level data files, including all data listed above and steps to estimate overall public charter school funding.

FY24 Statewide Total

- Every district and charter school received a TISA calculator that showed the ADM generated for every funding line included in TISA.
- The overall funding formula was roughly \$8.85 billion.
- Once the TISA rules were determined, there were shifts in the calculations.

FY24 Notes

- Process
 - 6 rounds of TISA data reporting allowed for earlier and more robust data reviews at the local level to ensure accuracy in final allocations.
 - Engagements with public charter schools introduced a different level of conversation than has existed historically.
 - Continuous feedback loops refined data presentation and explanations on key calculations.
- Outputs
 - Final statewide allocation was within .14% of the Spring 2022 estimate generated as TISA went through the legislative process.
 - No district's FY24 local contribution amount exceeded its maintenance of effort funding level (shift to TISA did not create new pressure on local tax base).
- Support Funding & Appeals
 - Included in legislation to support districts who might receive less funding than they under the BEP
 - 8 districts qualified for the BEP Transition Hold Harmless Funding
 - 5 districts were projected to qualify in the Spring 2022 estimates.
 - 1 district qualified due to closure of virtual school.
 - 2 districts qualified on finals due to small size and declining enrollment.
 - These schools faired on the side of having a smaller school district or substantial declines in student enrollment.
- 4 districts filed appeals.
 - 2 appeals filed on baseline funding calculation related to 2023 BEP allocations.
 - 2 appeals filed on significant data issues as submitted by districts.
- A committee member asked if legislation awarded CDF funding this year to support districts.
 - CDF funding was not awarded this year.

Priority 2: TISA Resources

Sam Percy continued the discussion and gave updates on TISA resources.

TISA Guide

- The TISA Guide outlines required data for the TISA formula and information on the following:
 - TISA Formula Components: Base, Weights, Direct, Outcomes
 - Fast-Growth Funds
 - Educator Salary Increases
 - Local Contribution and Fiscal Capacity
 - Distribution of Funds

- TISA Annual Calendar
- TISA Appeals Process
- Reporting Requirements
- TISA Accountability
- The department welcomes input from all stakeholders on additional information to be included in the guide. The guide will be updated as more information becomes available.

TISA Professional Development

TISA professional development modules are available publicly on the department's website <https://www.tn.gov/education/best-for-all/tnedufunding.html>.

- TISA Training Series: ~10-15-minute modules providing information on key components of TISA for stakeholders, such as CFO's, county commissioners, new directors of school and finance)
- Quick Guides: Companion documents to training modules providing highlights on various TISA topics.
- Available Modules:
 - TISA Overview
 - Local Contribution
 - Unique Learning Needs
 - Outcome Bonuses
 - Fast-Growth Funding
 - Support Funding
- Additional modules are being developed based on stakeholder feedback and requests.

TISA Engagement

- Spring 2023
 - TN Data and Attendance Conference - Spring – Attendance Supervisors/Data Leads
 - Fiscal Workshops – Finance Directors/Federal Program Directors
 - Charter Schools – Operators and Authorizers
 - TOSS Events – New Superintendent Academy, Legislative Conference
 - Regional Superintendent Study Council meetings - Directors
 - IT Regional User Groups – IT Directors
 - Coordinated School Health, SAVE Act Coordinators, and Family Resource Centers Leads Calls
- Fall 2023 (Planning)
 - Superintendent Study Council Annual Conference
 - TN Association of School Business Officials (TASBO)
 - TOSS New Superintendents Academy
 - TDAC Fall Conference
 - TN Government Finance Officers Association

- TN School Board Association
- Ongoing
 - Direct technical assistance calls
 - TISA Steering Committee
 - Finance Director office hours

Priority 3: Implementation Next Steps

TISA Rules

- Outcomes Rule Revisions
 - Received positive recommendation from SBE on February 10th
 - Rulemaking hearing held June 1, 2023
 - Continuing through formal rule promulgation process
 - Attorney General's Office Review
 - Secretary of State Public Posting Period
- CTE Rule Revisions
 - Reflects input from CTE engagement groups (included members of General Assembly, SCORE, THEC, TDLWFD, Secondary CTE Teachers, CTE Directors, Director of Schools, State Board Members, External Partners)
 - Focuses tiering of CTE programs of study with emphasis on:
 - High-wage (70%),
 - High-demand (20%)
 - High-skill (10%)
 - Continuing through formal rule promulgation process
 - Submission to Secretary of State and pending rulemaking hearing date.
 - Will be brought to SBE for recommendation after adjustments from public comment and rulemaking hearing.

Additional FY24 Funding Calculations

- 2022-23 Outcomes Bonuses for performance – \$80 million
 - Awarded by December
 - Rule updates are currently in the promulgation process.
 - Elementary and middle school data are currently being assessed.
 - High school data is both under review and will require additional data collection this fall.
- Fast Growth Funds - \$35 million
 - Student Stipends: Will be awarded in five rounds for districts that enrolled students above the amount funded by their TISA allocations. The first round will be awarded starting in October.
 - Infrastructure Stipends: Infrastructure stipends look at a district's consistent growth over three school years. Awarded after all student stipends are awarded for 2023-24. These come out at the end of the fiscal year.

Priority 4: Transparency & Accountability

Sam Percy emphasized that the department is shifting our attention to transparency and reporting and the accountability work that accompanies it.

- For the 2023-24 school year, and each year thereafter, reporting on school and district-level funding decisions under TISA will be available on the State Report Card.
- New features to support TISA transparency will include the TISA Calculator and Comparison Tool.
 - **TISA Calculator:** Allows a parent or guardian to input their student's unique information in a secure and anonymous tool that can demonstrate the amount of funding a student would generate under the TISA formula.
 - **Comparison Tool:** The school and LEA comparison tool is a new feature that allows users to select multiple schools or LEAs based on a variety of indicators (e.g., achievement, finances, demographics, etc.) and compare them all on one screen for easier viewing.

Sam Percy shared that districts have shared their concerns and questions with the accountability reporting. The department will release a template for LEAs in developing this report on August 8, 2023.

- T.C.A. § 49-3-112 requires LEAs to produce an accountability report that establishes goals for student achievement, including the goal of 70% or more of the LEA's third grade students demonstrate proficiency on the ELA TCAP.
 - Starting with reports submitted in 2024-25, the accountability report must also describe how the LEA's budget and expenditures for prior school years enabled the LEA to make progress toward the student achievement goals.
- The reports must be submitted to the department by November 1 of each year. LEAs must provide the opportunity for public comment before submitting the report to the department.

Priority 5: State Report Card Focus Groups

- Chelsea Crawford shared that the department has engagement with a variety of stakeholders to receive input and feedback on the language used for TISA reporting.
- The department aims to ensure that available information is understandable and able to be utilized by families and parents, which is the primary audience.
- Within the last week, focus groups met to discuss reporting.

State Report: Focus Group Findings

- Lack of exposure to TISA for these parents prior to focus group
- Belief that using TISA Calculator would directly impact their student's funding and a concern that parents may be dishonest to increase their student's allocation.

- Difficulty navigating question categories and a misunderstanding of the “why” behind the prompts required when using the TISA Calculator
 - A committee member highlighted the importance of reiterating to all stakeholders that TISA is a funding formula and not a spending plan as several have confused educational spending to mirror that of a personal checking account.
- Desire for a clear explanation of the transition from BEP to TISA
- General understanding that TISA better supports students needing additional supports, however there is a concern for how this impacts students who are on track and doing well.

State Reporting: TISA Communication and Resource Recommendations

Chelsea highlighted that the focus groups offered great insight to help parents and families better understand and utilize the tool. The focus group shared:

- Develop a communication campaign centered on spreading awareness about what TISA is, how it generally works, and why it is better than the previous formula.
- Create positive buzz/mindset and help parents approach the information with less skepticism.
- Include FAQ and potential scripts from Superintendents/Principals when they get questions from parents about allocations and where the funding dollars go.
- Provide a clear explanation of what TISA is and how base level funding works (i.e., How much does each student get no matter what, clarify this statewide.)
- Clear timeline from BEP to TISA

State Reporting: TISA Calculator Recommendations

Chelsea highlighted that the focus group shared great information around communication and encouraged a focus on clear communication.

The focus group shared:

- Make introductory language the first piece that users see.
- Remove jargon (i.e., sparse, special education consultation)
- Address deficit-based language around terms like “runaway,” and “migrant”
- Clarify base number (minimum funding for any student), how additional funding is provided, and what happens after allocations (i.e., money allocated x time, spent by y time, reporting on how it was spent by z time)
- Clarify that parent answers to the questions are demonstrative and do not affect their student’s allocation.
- Possibility of removing categories that wouldn’t apply based on school level.

Question & Discussion

- A committee member asked when data from the TN PULSE system will be pulled for

TISA reporting.

- The TN PULSE is a state system of record for individualized learning plans, individualized learning plans for students with dyslexia, IEP plans, which are all components that tie into students' allocations through the TISA funding formula.
- The department will begin pulling data monthly on reporting deadlines.
- Those inputting data can go back and ensure data is accurate, which was previously unavailable.
- All data inputting will be pulled on the next reporting deadline to ensure funding is received for the appropriate date.
- A committee member asked if the 20-day report period would continue.
 - The reporting period will remain on the 20-day reporting period.
- A committee member emphasized the need for training for data specialists and EIS coordinators for both the TISA Guide and TN PULSE. Training and regular office hours would be beneficial to ask questions and receive answers quickly.
- A committee member shared that the feedback for the focus groups was very insightful and showed intentionality and thoughtfulness from the department to articulate what TISA is meant to do in a digestible way. Also, it would be helpful for the department to share the communication plan for the next few months to a year.
- A committee member shared that merging financial and academic information is unfamiliar, so there needs to be guidance on the best way to house information. Also collecting data in a cohesive manner may be difficult as schools use different systems.
 - Sam emphasized the appreciation for this insight. The department is aware that there needs to be intentionality with the rollout of a system and phases for additional iterations.
- A committee member asked if the committee would be able to see a draft of the rule presented to the Secretary of State's website concerning outcomes/CTE rules and opportunities for feedback.
 - The rules will be posted on the Secretary of State's website. There will be robust communication as the department desire feedback.
 - Sam noted that the CTE rule revision was a collaborative effort, and the filing timing was in effect.
 - The original TISA rules followed this sequence of events: filed the rules, received public comment, conducted public hearings, and submitted to the State Board for approval and recommendation. The outcome rules were in reverse. CTE will follow the original format.
- A committee member asked were the thoughts to have a continuous focus group engagement.
 - There will be invitations for feedback and input including TISA specific components of the State Report Card overall.
 - The department desires to bring more diversity into the feedback loop.
- A committee member asked for demographics of the focus groups.

- Learning Heroes is the company that helps with the focus groups.
- Learning Heroes has experience with translation information to make it family/parent friendly. The department is excited to collaborate with them and utilize their expertise.
- Learning Heroes utilized a screener that assessed location, race, the child's grade level, political leaning, organizations participation (PTA, school boards, etc.) to create a diverse focus group.
- Four focus groups met last week.
 - Two groups focused on K-5th grade in public and charter schools. The group consisted of parents with mixed race backgrounds.
 - Two groups focused on 6th-12th grade in public and charter schools. The group consisted of parents with mixed race backgrounds.

Wrap Up/Announcements

Chelsea highlighted that committee members are welcome to be a focus group and to continue to send feedback and insights as they arise.

Adjourn

Next meeting: August 28, 2023, at 4:00-5:00 PM CT via Microsoft Teams